

## Sales Promotions Employee Procedure - Quick Reference Guide

### Introduction

To ensure rebates are processed accurately when finalizing an invoice with a sales promotion, it's important to follow the step-by-step instructions provided in this guide. For more detailed information please complete Sales Promotions Basics training or ask your supervisor for help.

### Procedure

Complete the following steps when finalizing an invoice with a sales promotion.

Step	Action												
1	Verify and update customer contact information in the POS.												
2	Verify Promo Code (PC) is listed on the invoice. (Only for Exclusive and Pillar Promotions)												
3	Verify invoice numbers. The reprinted invoice number is the original invoice number.												
4	Verify Timeframes. (See grace period section below)												
5	Print rebate forms and educate the customer; follow these steps: <table border="1"> <tr> <th>Step</th><th>Action</th></tr> <tr> <td>1</td><td>Locate and print the appropriate rebate forms, then highlight: <ul style="list-style-type: none"> <li>Offer number</li> <li>Submission deadline</li> <li>Online submission website</li> <li>Support contact phone number</li> </ul> </td></tr> <tr> <td>2</td><td>Review the highlighted information and remind the customer to submit (postmark) by the deadline.</td></tr> <tr> <td>3</td><td>Review both the customer information and invoice number; then remind them that the rebate submission information must match the invoice information.</td></tr> <tr> <td>4</td><td>Set timeframe expectations for receiving the rebate.</td></tr> <tr> <td>5</td><td>Set customer support expectations and remind the customer to direct all questions to the contact number on the rebate form.</td></tr> </table>	Step	Action	1	Locate and print the appropriate rebate forms, then highlight: <ul style="list-style-type: none"> <li>Offer number</li> <li>Submission deadline</li> <li>Online submission website</li> <li>Support contact phone number</li> </ul>	2	Review the highlighted information and remind the customer to submit (postmark) by the deadline.	3	Review both the customer information and invoice number; then remind them that the rebate submission information must match the invoice information.	4	Set timeframe expectations for receiving the rebate.	5	Set customer support expectations and remind the customer to direct all questions to the contact number on the rebate form.
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### Check Rebate Status

- Exclusive and Pillar: Visit <https://dt.rebatepromotions.com/#!/tracker>
- Manufacturer: Review rebate form for instructions.

### Grace Period

- Exclusive and Pillar: Five days before and after promotional period. Rebate submission is valid provided that the purchase is initiated **or** completed within the promotional period.
- Manufacturer: No grace period. Rebate submission is valid only if the purchase is initiated **and** completed within the promotional period.

### Support Channel Definitions

Support channels vary by promotion and are listed on the Promotion Brief.

<b>Store Help Line</b>	Store employee support for Exclusive and Pillar promotions
<b>Rebate Center</b>	Customer support for Exclusive and Pillar promotions
<b>Rebate Help</b>	Customer support for Manufacturer promotions.